

Tourism NT International Managers' Meeting

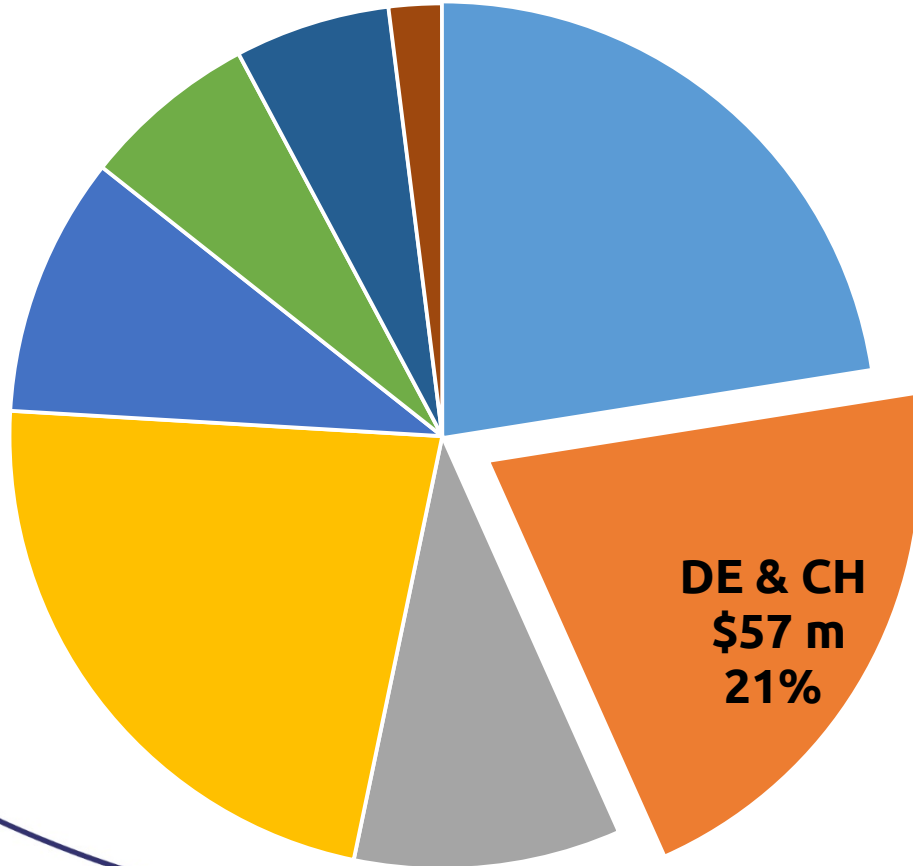
Market Updates 2019

CENTRAL EUROPE

Andreas Schunck &
Verena Ullrich

Germany & Switzerland

Proportion of International Holiday Expenditure
(3 year average IVS YE March 2019)



2030 Target: 50,000 Visitors

Compound Average Annual Growth Rate: 3.1%

Germany

24,000 holiday visitors ↓ 7.6% YOY June 2019

Switzerland

11,000 holiday visitors ↑ 17% YOY June 2019

Dispersal of German visitors:

1. MacDonnell region (66%)
2. Lasseter region (60%)
3. Greater Darwin region (43%)

- Strong economic growth
- High household incomes
- 4- 6 weeks annual Leave per year
- Long length of stay, high dispersal
- Adventurous, enjoy self-drive

Team Central Europe



Verena Ullrich
PR Manager



Andreas Schunck
Marketing Manager



Katja Bockwinkel
Manager Trade
Marketing & Events

State of the Market

- Germany is the largest economy in Europe and the fifth largest GDP in the world
- Switzerland is one of the wealthiest countries in the world
- Stable conditions and low unemployment in both countries
- Continued (holiday) spending as there is little to no interest available for sav
- Strong buying power because of the favourable EUR & CHF/AUD exchange
- The U.S. is the most important long-haul destination followed by Thailand
- For YE Jul19, overall arrivals from Germany to Australia decreased slightly



Trends & Insights

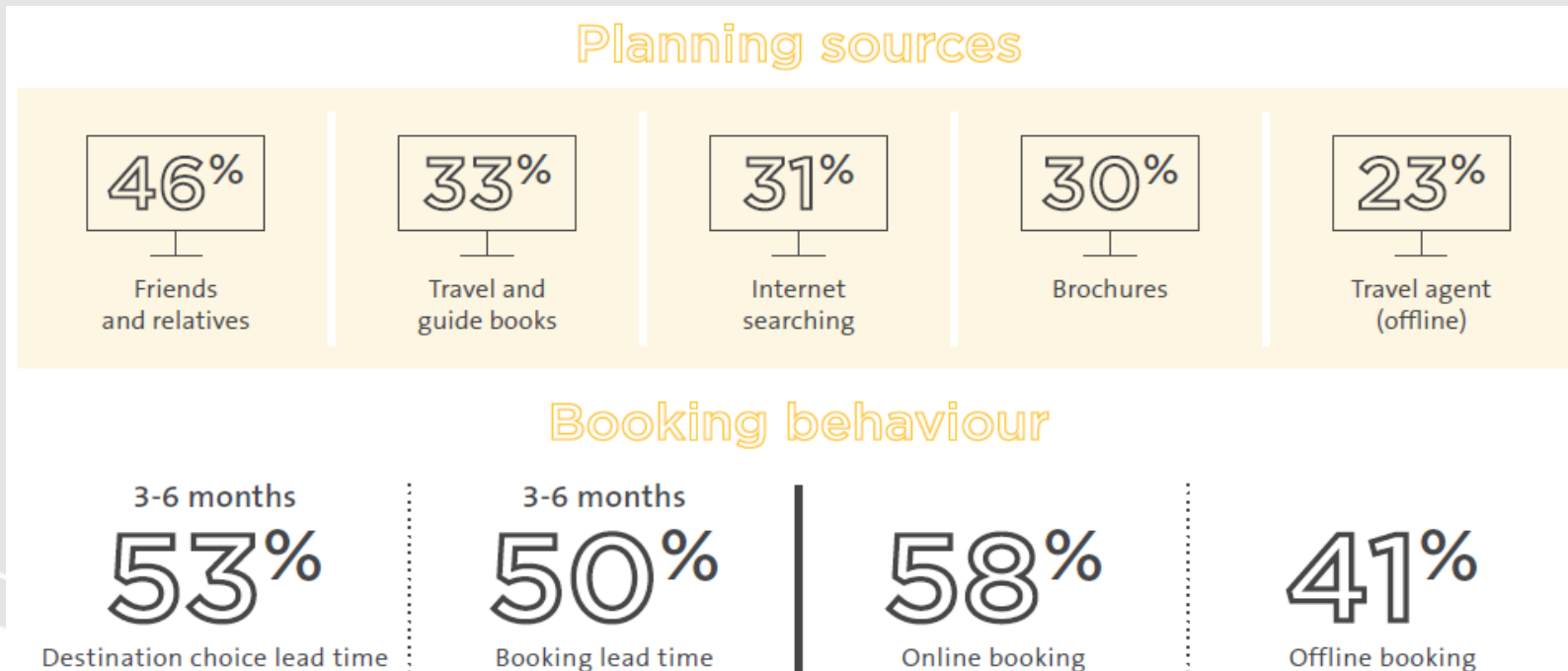
- Germany WHV grants have decreased by -11% for FY 19 and -16% for the period Jul-Aug 19
- Reason being low youth unemployment rates, lack of fashionability and negative job conditions press coverage



CHILE, PERU, ARGENTINA ETC.

Trends & Insights

- Although Germany and Switzerland are very 'traditional' markets, the share of online bookings are increasing
- 58% of German 'High Value Travellers' (HVT), Tourism NT's primary target audience, are booking their travels online



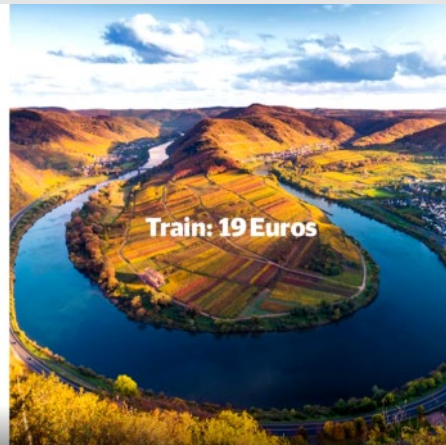
Challenges

- Fridays for future protests, flight shaming and proposed legislation to reduce travel related CO2 emissions



Challenges

- **No need to fly around the world** campaign German Rail Deutsche Bahn



Challenges

- Lack of international air connectivity and awareness especially for the Top End are major struggles
- Significant competition from established and emerging long-haul destinations with similar propositions around nature, wildlife, camping, self-drive, wide open spaces and indigenous



Key Trade & Consumer Campaigns 2018-19

Australia's Wild Sights Campaign Germany

Results Explorer Fernreisen:

- Total PAX: **266** (+12,24 % YOY)
- Guided tour bookings: **186** (+36,76 % YOY)
- ROI: **6:1**
- Economic impact: **AUD 337,288**

Partner contribution generated: **AUD 158,730**



PROGRAMMATIC ADVERTISING
5 MILLION AD IMPRESSIONS
13,383 CLICKS
0,29 % CTR
6,262 VISITS



PRINT RUN 36-PAGE
SUPPLEMENT: **205,000**



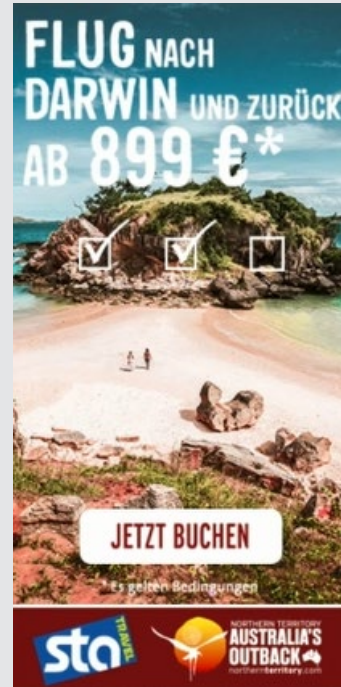
Key Trade & Consumer Campaigns 2018-19

Digital Youth Campaign Germany

Results STA Travel & Erlebe Fernreisen:

- **417** PAX
- **345** bookings (land arrangements)
- ROI: **3:1**
- Economic impact: **AUD 528,756**

Partner contribution generated: **AUD 130,649**



PROGRAMMATIC ADVERTISING
PROSPECTING PHASE:
19,906 CLICKS
8,405,207 IMPRESSIONS
CTR 0.24%



PROGRAMMATIC ADVERTISING
RETARGETING PHASE:
24,124 CLICKS
1,761,769 IMPRESSIONS
CTR 1.57%



Key Trade & Consumer Campaigns 2018-19

Explorers Way Campaign Germany & Switzerland

Results TUI:

- **268** PAX (+ 40,31 % YOY)
- Room nights **+34,9 %** YOY (295 vs 398)
- ROI: **5:1**
- Economic impact: **AUD 339,824**

Results Travelhouse:

- **67** PAX (+36,73 % YOY)
- Room nights **+41,98 %** YOY (212 vs 301)
- ROI: **4:1**
- Economic impact: **AUD 124,017**

Partner contribution generated: **AUD 233,016**



Key Trade & Consumer Campaigns 2018-19

Kayak Campaign Germany including kayak.de and their two brands swoodoo.de and momondo.de.

Results Kayak / Swoodoo / Momondo:

- **1,868** PAX (+22,39 % YOY)
- **847** hotel bookings (+34,84 % YOY)
- ROI: **20:1**
- Economic impact: **AUD 2,368,624**

Partner contribution generated: **AUD 63,492**



CAMPAIGN REACH
26,453 UNIQUE USERS
2:10 AVG. DWELL TIME
32,456 PAGE VIEWS
> 3,000,000 IMPRESSIONS
21,673 CLICKS

Key Trade & Consumer Campaigns 2018-19

UnDiscover Australia Campaign Germany

Results Boomerang Reisen:

- **574 PAX** (+14,8 % YOY)
- ROI: **9:1**
- Economic impact: **AUD 727,832**

Partner contribution generated: **AUD 254,286**



Deutsche denken,
in Australiens Outback
gibt es nichts zu tun.

BOOMERANG REISEN Spezialist für Fernreisen

Nur schöne Sonnenuntergänge und nichts zu tun?! Nicht auf einer Reise durch Westaustralien und das Northern Territory! Schon mal mit einem Walhai geschwommen oder ein Selfie mit einem Känguru am Strand gemacht?! Mit dem Airboat über Wetlands gestiegen oder die morgentliche Stille in einem Heißluftballon über der endlos scheinenden roten Erde genossen?! Nein? Dann auf nach Down Under! Egal, ob Sie sich für Darwin, die quirlige, tropische Hauptstadt des Northern Territory oder für Perth, die boomende Metropole in Westaustralien als Startpunkt Ihrer Reise entscheiden: Beide Städte sind in unter 18 Stunden Flugzeit ab Europa zu erreichen - Ihr Abenteuer Australien kann also beginnen. Was macht Westaustralien und das Northern Territory so besonders?

Bilder mit freundlicher Unterstützung von
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CAMPAIGN REACH
24,593 UNIQUE VISITORS
9,251,446 IMPRESSIONS
46,709 CLICKS
AVERAGE CTR 0,50 %



Australia.com
Gesponsert ·

An alle Deutschen, die denken, in Australiens Outback gibt es nichts zu tun.

UnErwartet anders.
Australien.

16 Tage Camperreise inkl. Flug
ab € 3.149

Jetzt buchen



Key Trade & Consumer Campaigns 2018-19

Explorers Way / Best of Travel Group, DER Touristik / Singapore Airlines and Coco Weltweit Reisen Campaigns



EXPLORERS WAY
2019/20

AB DURCH DIE MITTE –
ADELAIDE BIS DARWIN

EXPLORERS WAY
BEST OF TRAVEL GROUP

173 PAX



MEIERS WELTREISEN

Australiens Northern Territory
Flug und Mietwagen
14 Tage
Flug ab/bis Deutschland nach Darwin mit Singapore Airlines, Avis-Mietwagen (Kat.B Compact)
Pro Person ab € 1.606
Bei Buchung mit 2 Pers.

Weitere Informationen und Buchung in Ihrem Reisebüro und auf www.meiers-weltreisen.de

DER SPEZIALIST FÜR ALLES FERNE.

DER
Touristik

SINGAPORE AIRLINES
A SINGAPORE AIRLINES AIRLINE

AUSTRALIA'S OUTBACK
NORTHERN TERRITORY

1,403 PAX
ROI 39:1
ECONOMIC IMPACT
AUD \$1,779,004



NORTHERN TERRITORY AUSTRALIA'S OUTBACK
northernterritory.com

COCO
weltweit
reisen

VOM RED CENTRE...

4WD-SAFARI IM RED CENTRE
6-tägige Selbstfahrende Reise mit den Highlights des Red Centre. Vom Ayers Rock über den Kings Canyon und Glen Helen nach Alice Springs!
Inklusive Leistungen:
- 6 Tage 4WD-Mietwagen mit All-Inclusive Versicherung
- 5 Nächte in Mittelklassehotels
- 1x Frühstück (im Kings Canyon Resort)
ab 779 € p.P.

DIE FARBEN DES OUTBACKS
Geführte 6-tägige, deutschsprachige Rundreise vom Ayers Rock nach Alice Springs. Mit Uluru-Kata Tjuta Nationalpark, Kings Canyon, Glen Helen und Western Macdonnell Ranges!
Inklusive Leistungen:
- Rundreise im modernen Allradfahrzeug
- deutschsprachige Reiseleitung
- 5 Nächte in Mittelklassehotels
- 1x Frühstück, 3x Mittagessen, 4x Abendessen
ab 2.029 € p.P.

...ZUM TOP END

4WD-SAFARI AM TOP END
6-tägige Selbstfahrende Reise am Top End ab/bis Darwin! Mit dem Kakadu Nationalpark, der Katherine Gorge und dem Litchfield Nationalpark!
Inklusive Leistungen:
- 5 Tage 4WD-Mietwagen mit All-Inclusive Versicherung
- 5 Nächte in Mittelklassehotels
- 4x Frühstück
ab 675 € p.P.

JABIRU DREAMING
Geführte 5-tägige Campingtour mit den Highlights des Top End! Sie besuchen den Litchfield und den Kakadu Nationalpark, sowie die Katherine Gorge!
Inklusive Leistungen:
- Rundreise im modernen Allradfahrzeug
- englischsprachige Reiseleitung
- 5 Nächte Camping in Trossen Zelt
- 4x Frühstück, 5x Mittagessen, 4x Abendessen
ab 800 € p.P.

COCO Weltweit Reisen
0390 Mühlstein, Salumer Straße 2, Telefon 03972-28924
0020 Innsbruck, Eduard Bodem Gasse 1, Telefon 0512-312524
www.coco-tours.at | coco@coco-tours.at

Able 1000 © Touristik AG

15 PAX



Organic Social Media Activities

- Increased fan number from Germany: 51,400 fans (aim was 45,000)
- Posting German content on the NT Facebook page & community management
- Blogger breakfast with TA at ITB, Blogger get together during Berlin Travel Festival



PR Highlights 2018-19



PLAY



**In 2019 German media
talked about...**

Press Famil “Once in a lifetime” (May 2019)

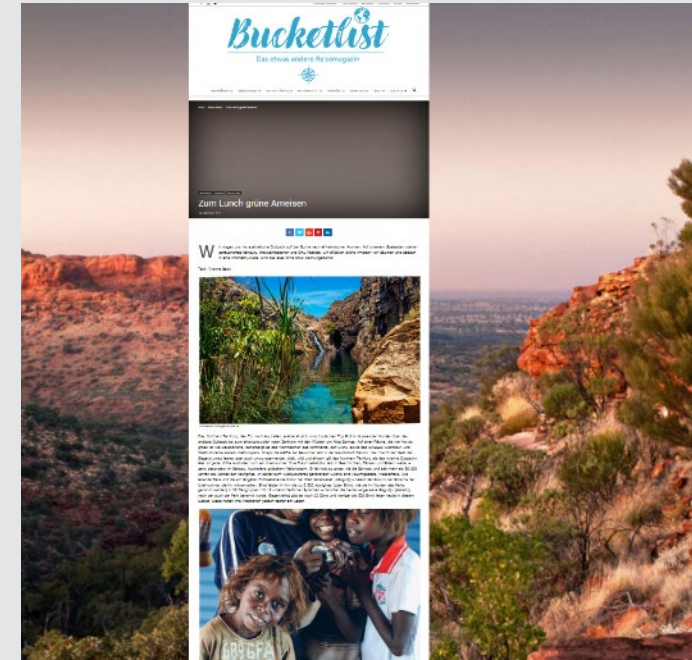
Press Famil with 5 participants:

- Sueddeutsche Zeitung (3 articles placed, 1.4 million readers)
 - Rheinzeitung (3 articles placed, 633,000 readers)
 - Imagine (cover story + 8 pages, Swiss magazine, edition 30,000)
 - WZ (several publications, 2 stories sold, 300,000 readers)
 - Freelancer for i.e. GEO Saison, FAZ (3 print stories sold so far)
- Itinerary highlighted unique experiences from Red Centre to Darwin and beyond
 - Feedback: “...diverse and eye-opening – so many stories for the upcoming years!”



Press Famil “Eventful NT” (April 2019)

- International Press Famil for Taste of Kakadu, Parrtjima and more
- One German participant: Yvonne Beck writes for Bucketlist, a German/Swiss Travel magazine for special and immersive traveling; Edition: 35,000
- Result: Coverstory + six pages + online



Individual Famils

Tom Noga

- May 2019
- Topics: Bush Tucker & Indigenous culture in Alice Springs
- Media: Sueddeutsche (1.4 million readers) & WDR radio (1.05 million listeners)

Daniel Scherz

- October 2019
- Topics: Adventure in the Top End
- Media: ReiseLust (biggest travel publication in Austria; edition 90,000) & Traveller.at (B2B magazine for travel trade in Austria; edition 10,000)

Press Event “Dundee” Hamburg

- Dundee back on the big screen for one night
- Event in cooperation with Tourism Australia
- Reception for approx. 30 leading German journalists
- Presentation of NT highlights & news
- Personal meeting with journalists (speed dating)
- Movie screening afterwards



Key Trade Activities – New Experiences Roadshow

- 20 product partners from the NT and SA
- 100 retail travel agents, Aussie Specialists and travel trade media representatives
- 27 industry partners from Germany, Switzerland, Italy and France at the product manager workshop



Key Trade Activities –Events

- ITB Berlin 2019: Tourism NT met with more than 70 trade, airline, media and affinity partners
- Berlin Travel Festival 2019: 11,000 consumers and roughly 2,000 travel professionals attended the event



Key Trade Activities – Education & Famils



Strategy 2019/20

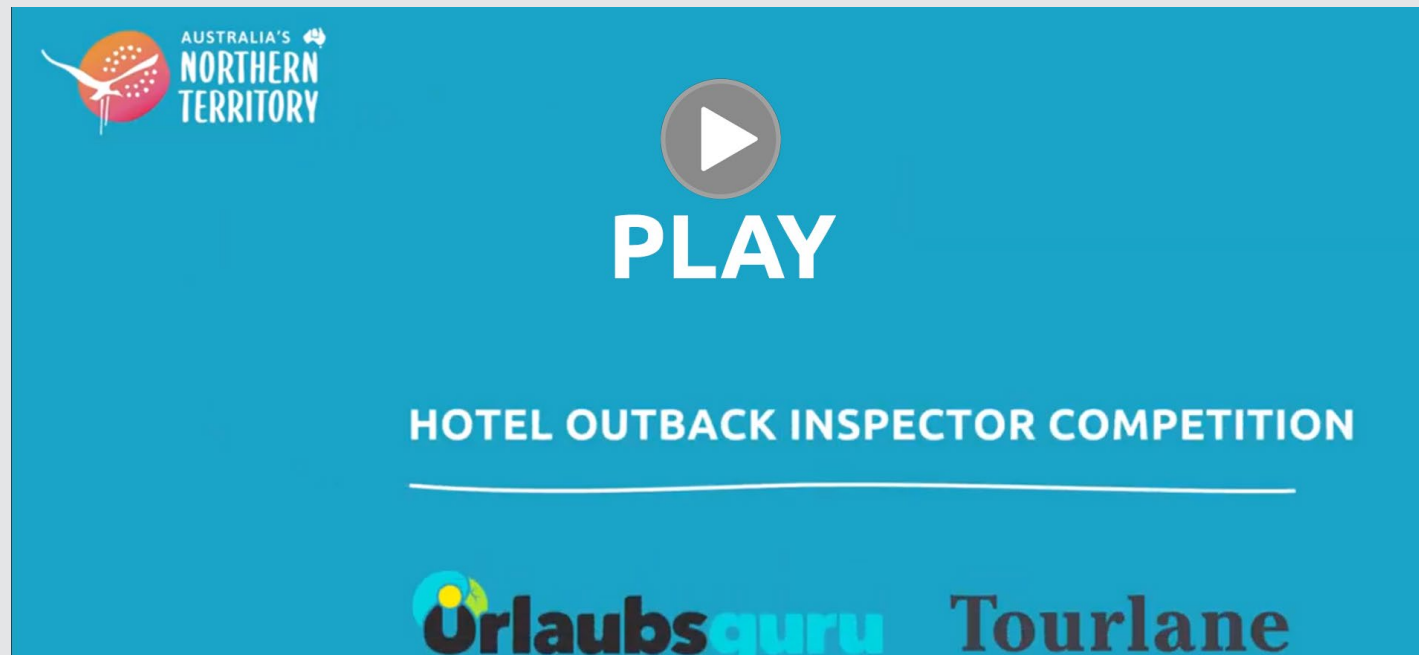
Brand Positioning



Strategy 2019/20

Smart Marketing

‘Welcome to the Hotel Outback – A billion-star retreat’



Strategy 2019/20

Digital Advertising

The image displays three digital advertising banners arranged vertically. Each banner features a white curved shape on the right side containing the Singapore Airlines and Australia's Northern Territory logos.

- Top Banner:** The background shows a yellow tent on a wooden platform at night, with a radio tower visible in the distance. The text reads "Willkommen im Hotel Outback".
- Middle Banner:** The background shows a landscape with a large red rock formation (Uluru) under a starry night sky. The text reads "Ausgezeichnet mit Millionen von Sternen".
- Bottom Banner:** The background shows a Singapore Airlines plane flying over a cloudy sky. The text includes:
 - "Flieg jetzt mit der am häufigsten ausgezeichneten Airline!"
 - "Schon ab €999,-*" (where the price is in a large, bold font)
 - "mit nur 1 Stopp nach Darwin"
 - "*Es gelten Bedingungen"
 - A red button with the text "Take me there!"

Strategy 2019/20

Trade Activities

- Marketing campaigns with trade partners
- Ongoing travel agent and product manager education trainings
- Product development e.g. Stravel Package Darwin



The banner features a split image: on the left, a person in a graduation cap; on the right, a person with a suitcase walking towards a sunset. The text 'Erfülle dir deinen Traum gleich doppelt! Studieren und dabei auf Weltreise gehen!' is centered. Below it, the equation 'study + travel = stravel' is displayed in large yellow letters. A yellow button at the bottom right says 'JETZT BEWERBEN'. The top left has the 'Stravel.in Study & travel' logo, and the top right shows contact information: 'Start@Stravel.in' and '+49 7371 9315-0'. Navigation links include 'STUDIENGÄNGE', 'DAS STRAVEL-TICKET', 'FÖRDERUNG', 'ÜBER UNS', and 'FAQS'.



The page is titled 'Das Stravel-Ticket - Auf an's andere Ende der Welt'. It describes an exclusive flight ticket valid for 18 months with an open return. It mentions a partnership with 'hm touristik' and the 'Northern Territory, Australiens Outback'. The text encourages exploring the Australian Outback and offers flexibility in travel plans. A list of benefits is provided on the right, and a disclaimer at the bottom states that offers are subject to availability and require a Working Holiday Visa.

Das Stravel-Ticket - Auf an's andere Ende der Welt

Du erhältst von uns ein exklusives Flugticket, das es so normal nicht gibt - Es hat einen offenen Rückflug und ist ganze 18 Monate gültig!

Zusammen mit [hm touristik](#) und dem [Northern Territory, Australiens Outback](#), machen wir es möglich und schicken dich mit diesem exklusiven Ticket ans andere Ende der Welt, nach Darwin in Australien!

Erlebe das australische Outback im Northern Territory und starte von dort aus weiter, um den Australischen Kontinent zu erkunden. Fliege wann du möchtest weiter, das Ticket macht es möglich. Mache einen Abstecher nach Neuseeland, Asien oder in die Südsee - die Welt steht dir offen!

Das Stravel-Ticket im Detail

- ✓ Fliege los wann du willst.*
- ✓ Ab Reisebeginn hast du 18 Monate.**
- ✓ Starte oder beende deinen Trip in Darwin im Norden Australiens.*
- ✓ Stops in Asien und in Australien ohne Aufpreis möglich.*
- ✓ Erweitere dein Ticket um bsp. Neuseeland oder der Südsee.
- ✓ Genieße volle Flexibilität - Das Ticket ist während der Reise umbuchbar.*
- ✓ Buche deinen Rückflug während der Reise bei hm touristik ein, sobald du weißt, wann du zurück willst.*

* Alle Angebote sind vorbehaltlich der Verfügbarkeit und nur in Verbindung mit einem Workingholiday Visa um gültig.

Strategy 2019/20

TA and STO partnerships



Strategy 2019/20

Awareness

- Invest in awareness
- Authentic storytelling
- Support sustainability

Opportunities for Operators

- **Ask us!** About distribution channels, wholesale partners, consumer minds...
- **Come and visit us!** Join key events such as ITB, UK Marketplace or individual sales calls
- **Meet the key buyers** from our market at ATE!
- **Meet selected German & Swiss Aussie Specialist Travel Agents** at Corroboree West!
- **Showcase your product** and get involved in our trade and media famils!
- **Share your news!** Our trade and consumer comms and social channels are looking for your input
- **Join** our regular Agent Training Webinars!

Dankeschön

